



**EIGHTH
REVOLUTION**



**ARCVIEW
CONSULTING**

Cannabis & Hemp

MONTHLY PLAYBOOK

NOVEMBER 2021



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Dear Reader,

We want to thank you for your trust, and most importantly, your time. With the endless amount of resources at your disposal, we appreciate you leaning on us as your guide through the muddy waters of this industry's limitless news and intelligence.

In an industry that changes as aggressively as ours, we can't stress the importance of effective decision making enough. Though the information in the report is never meant to dictate specific actions or guarantee certain outcomes, we hope that we're able to provide another voice in the room, one that illuminates, simplifies, and supports you.

If you find one area more helpful than others and want us to expand on it, please never hesitate to reach out. For any suggestions or questions, we can be reached directly at info@8threv.com

Welcome to the Revolution



Bryan Fields

*Managing Director &
Co-Founder
Eighth Revolution*



Kellen Finney

*CSO & Co-Founder
Eighth Revolution*



David Abernathy

*Principal
Arcview Consulting*



Jason Malcom

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IN THIS ISSUE

NOVEMBER 2021

Growing Pains and Seasonal Changes

Kellen Finney, *Eighth Revolution*

November brings snow to the mountains and colder weather to the rest of the country. Most companies are wrapping up harvesting and processing of this year's crop, with grim news trickling in from the whole sale market. Due to current volatility in the wholesale market we are advising our clients to focus on proper storage of the crop in order to wait out the dip in wholesale prices for both hemp and cannabis on the west coast. Volatility is associated with growing pains for maturing markets, which is a good sign for the cannabis and hemp industries as both markets continue to move forward, even with less than perfect market conditions. Due to the volatility, most companies we speak with are looking to automation to try and increase margins while they wait out the storm. The good news is we will be here to provide insights and tips on how to weather the storm and be prepared to thrive once the sun comes out again.

Innovation is on its way!

Bryan Fields, *Eighth Revolution*

Post MJBIZCON it's almost impossible not to be extremely bullish on the direction of the industry. Skilled, creative passionate teams have found their calling and are flooding into the cannabinoid industry. We are on the verge of a much-needed welcoming of breakthroughs everywhere from genetics to retail. On the medical side, conversations and early studies of these findings in cannabinoid therapies will be eye opening to the public. As someone who spends most of their time reading everything in the space and asking questions to dive deeper into true understanding, I am shocked by the incredible insights being uncovered. My predictions for 2022 include a myriad of innovations with potential to set a new standard for the industry, accelerating its growth to another level. So buckle up!

“

In the past year alone,
the cannabis industry
has made
tremendous strides
toward becoming
a full-fledged
CPG sector

Rosie Mattio

Letter From The Team,

When you own the supply chain, you can take a more extreme cost cutting approach to drive down costs to either keep your margins healthy and consistent or drop them in relation to the internal costs. In some extreme cases, these operators are willing to undercut their competitors to attract customers and build brand loyalty, often leading to slashing margins even further.

Competition continues to heat up with many operators looking to catch market leader Trulieve. According to the OMMU or the Official Medical Marijuana Use, Trulieve has 91 dispensing locations, that is 15% more than the next two largest operators Florida COMBINED (Liberty Healthy Sciences 40 locations and Surterra Wellness 39 locations). That is a massive advantage in a key battleground state. Challenging the current market leader, who has a stranglehold on the market, requires aggressive marketing tactics. Just the sheer number of dispensaries will keep Trulieve out in front of the competition based on customer proximity. As competition heats up in this battleground, margin consolidation will likely occur which does ultimately benefit the end customer. The important part is to consider the quality of the product and to optimize those margins with technology.

Last month at MJBIZCON, 8th Revolution's own, Kellan Finney, spoke about optimization of the cannabis industry via Smart Sensors. The conversation centered around the importance of understanding how to maximize your margins through automation as well as keep a consistent, high-quality product that adheres to the highest quality control standards. This technology is a mainstay in other mature industries that manufacture products for their importance of monitoring the process in real time. What does monitoring your process in real-time actually do and how does this apply directly to the cannabinoid space? Being able to monitor your manufacturing facility in real-time allows for endless opportunities to maximize margins. Separation of cannabinoids allows you to recognize when your run is optimal or monitoring potency ensures your products are within anticipated product characteristics to ensure the customer has a repeatable experience.

The ability to understand your true costs, and maximize your extraction run while minimizing your operational costs, whether its consumables or personal, will allow operators to continue to deliver high-quality products at competitive margins.

TOP MARKETS TO LAUNCH A BRAND

November 2021

1.

VERMONT

Vermont has 142,000 consumers from an addressable market which generated \$20 million in sales for just the medical market. With adult use cannabis just becoming legal and projections for adult use market hitting ~200 million by 2023. This state tops our list as one of the best places to launch a brand with proximity to larger markets and less competition your brand would have time to grow up without competing with the larger well capitalized companies.

2.

NEW JERSEY

Building the regulations and system for New Jerseys market continues to outpace their neighbors across the bridge in New York. Total market value estimated at ~\$2.0 billion by 2023 and proximity to one of the largest cities in the world makes New Jersey the second-best market to start a brand.

3.

CALIFORNIA

Market size currently hovering around \$5.5 billion dollars California comes in third on our list. The reason California does not top this list is due to the challenges operators have navigating the regulatory aspect of running a cannabis operation. Pair that with the rules favoring larger operations and it creates unique challenges for launching a brand.

4.

VIRGINIA

The third east coast state on our list falls at number 4, the east coast markets will be the most exciting markets for the next 5 years as dominos continue to fall. Estimates place the total addressable market at ~\$500 million by 2023, paired with 225% 5-year CAGR and there is opportunity for several brands to build companies that tailor to the southern demographic, positioning them for legalization across the rest of the southeastern states.

5.

MASSACHUSETTS

Home to two of the most prestigious universities in the world (Harvard and MIT) and a thriving billion-dollar market. Massachusetts not only will provide companies access to top talent but also allow for capital to develop products that could help capture significant market share in other states. These reasons are why Massachusetts comes in 5th on our list.

Why Open a Cannabis Microbusiness?

New Business Model Creates Both Opportunities and Challenges for Small Business Owners

While restrictions on size and production might immediately deter some business owners, the model of microbusinesses may support the growth of small-scale cannabis producers in an increasingly fast-paced industry. A [microbusiness](#) is a licensed business with a relatively small operation. During the microbusiness application process, smaller players and entrepreneurial start-ups in the cannabis space only compete against one another, therefore avoiding direct competition with larger, more established businesses. Ideally, this gives smaller and/or newer companies an opportunity to enter the cannabis space [without the competitive influence of multi-state operators](#) (MSOs) who are also applying for a set number of regional cannabis licenses.

Microbusinesses can be cannabis cultivators, manufacturers, distributors, retailers, or delivery services. The microbusiness must submit a successful application to their local cannabis regulatory commission and meet all the following requirements:

- Employ no more than 10 individuals at one time;

- Maintain a physical plant of no more than 2,500 square feet; and in the case of a cannabis cultivator, the canopy height cannot be more than 24 feet;
- Possess no more than 1,000 mature cannabis plants each month (cannabis distributors are exempt); and
- Acquire no more than 1,000 pounds of usable cannabis (or the equivalent amount in other forms) each month.

For small business owners, these highly specific requirements may be especially difficult to fulfill, which has prompted state-level efforts to better support smaller cannabis growers. In Michigan, the recently introduced “Class A” microbusiness license aims to create a more economically feasible – and more inclusive – business model by doubling the allowable in-house plant count to 300. It also permits microbusinesses to purchase or acquire mature plants from licensed growers, registered caregivers, or patients, and purchase ready-to-sell edibles, concentrates, vaping cartridges and other non-flower products from licensed processors, all of which were forbidden under the former Michigan microbusiness rules. In light of these changes, regulators noted two key challenges that weigh heavily

Why Open a Cannabis Microbusiness?

New Business Model Creates Both Opportunities and Challenges for Small Business Owners

on microbusinesses: the costs of on-site production, and cultivating enough plant biomass to build a sustainable product line.

In consideration of these challenges, successful applicants may view microbusinesses as an easier path to obtaining a cannabis business license, particularly among local and minority business owners. On February 22, 2021, New Jersey Governor Phil Murphy signed into law the Cannabis Regulatory, Enforcement Assistance, and Marketplace Modernization Act, which proposes that 15% of the cannabis business licenses be granted to minority-owned businesses, and another 15% of the licenses to women-owned businesses or disabled veteran-owned businesses. New Jersey law also identifies certain municipalities as “impact zones,” or areas disproportionately affected by crime and unemployment, and prioritizes microbusiness license applications in these regions. Additionally, while this law provides that no more than 37 cannabis cultivator licenses will be issued in New Jersey during the first two years after enactment, that cap does not apply to microbusinesses.

Nationally, the details and long-term outcomes of microbusiness legislation


will continue to evolve alongside the development of application forms and in response to the needs of cannabis entrepreneurs. This relationship between small businesses and regional legislation is precarious, and yet essential to the continued growth of small-scale cannabis businesses seeking to compete with – or, at best, exist alongside of – larger, widely recognized, and well-capitalized cannabis companies.

If you are interested in learning more about other key trends in the cannabis industry, please contact info@8threv.com to continue accessing highly relevant and data-driven content.

Take-Aways:

- Microbusiness licenses require applicants meet specific size and operational criteria, which can be difficult for applicants to fulfill – both logistically and financially.
- Ideally, microbusinesses allow local and minority-owned businesses to compete and grow separately from larger, better-capitalized cannabis businesses.
- Recent legislation in Michigan and New Jersey serves as examples for other states seeking to support and protect smaller-scale recreational cannabis businesses.

SECTOR ANALYSIS*

	INDICES	3 MONTH	6 MONTH
	S&P 500	-0.45%	8.18%
	DOW JONES	1.11%	2.14%
	NASDAQ	3.24%	7.31%
	GLOBAL CANNABIS INDEX	-15.17%	-23.69%
	AMERICAN CANNABIS STOCK INDEX	-21.61%	-32.37%



Pablo Zuanic said Wednesday, that he “still likes the setup for U.S. multi-state cannabis operators ahead of potential stock uplistings to major U.S. exchanges.”³

*This text expresses the opinion solely of the writer. The thoughts expressed are independently formed and the writer is not compensated by any third party.

	SECTOR	3 MONTH	6 MONTH
	HEALTHCARE	-6.29%	7.01%
	TECHNOLOGY	7.1%	11.29%
	INDUSTRIALS	2.68%	4.64%
	FINANCIALS	7.75%	11.64%
	CONSUMER CYCLICAL	1.83%	4.41%
	CONSUMER NON-CYCLICAL	-1.43%	0.48%
	BASIC MATERIALS	-1.56%	0.33%
	ENERGY	16.12%	21.87%
	UTILITIES	0.2%	-1.65%
	ALTERNATIVE HARVEST ETF (MJ)	-18.8%	-31.33%
	MULTI-STATE OPERATORS (MSOS)	-21.15%	-28.61%

*Information retrieved from NCV and E*trade.

DOMESTIC NEWS



South Dakota 2022 recreational marijuana campaign kicks off

South Dakota secretary of state's office on Tuesday approved a draft of a statewide ballot measure for 2022, meaning the campaign – South Dakotans for Better Marijuana Laws (SDBML) – can start collecting the 17,000 voter signatures it needs by Nov. 8 to get a spot in next year's election...



NJ legal weed: 14 new permits issued to grow medical marijuana, including new dispensaries

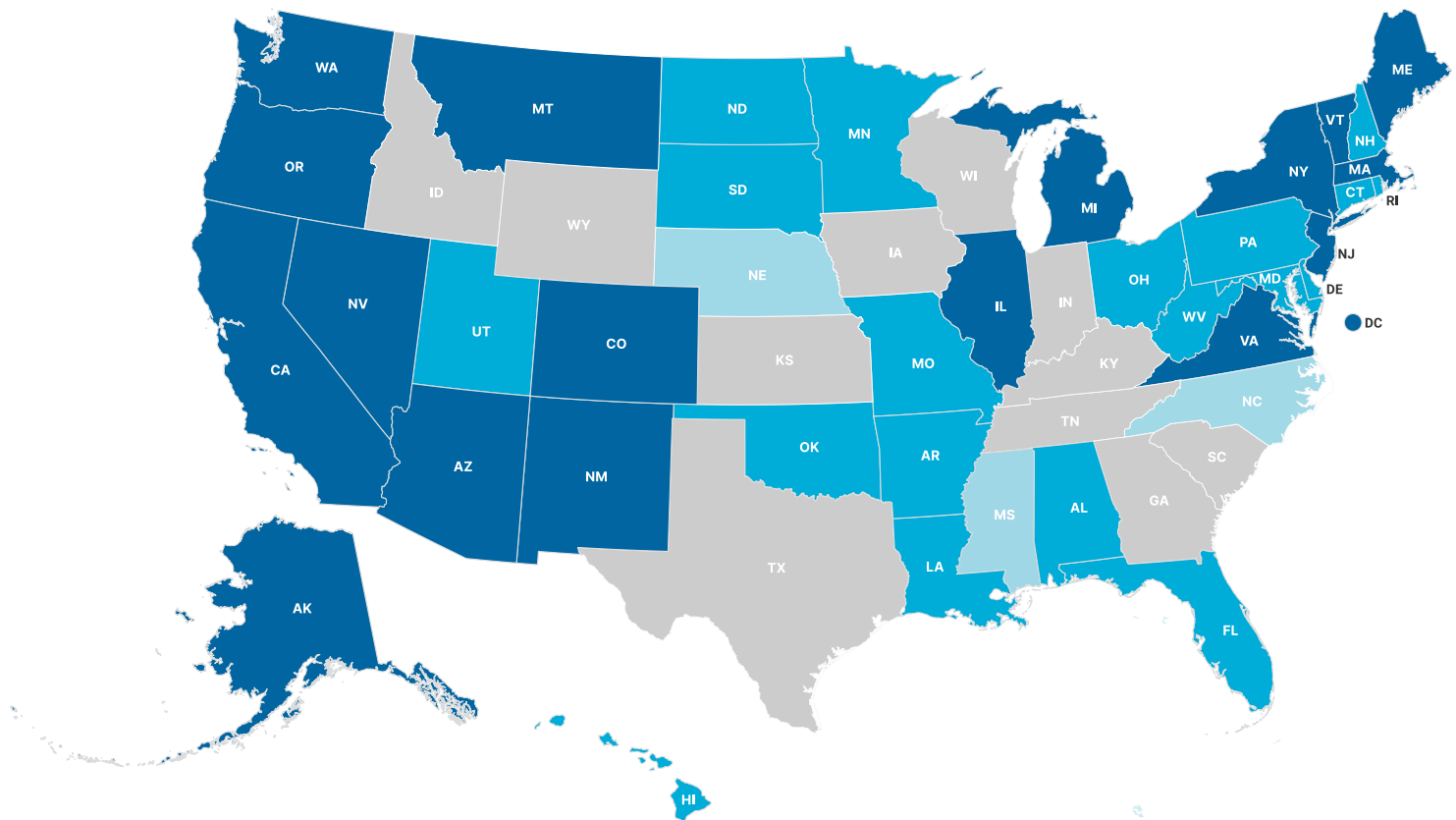
The number of legal cannabis growers in the state will more than double after regulators on Friday issued new licenses designed to ease crippling supply issues for medical marijuana patients and push the state closer to legal weed sales for all adults...



Republican Ohio Lawmakers Announce Marijuana Legalization Bill, Reflecting Recent Bipartisan Shift On Issue

Limited home cultivation would be allowed, and half of revenue resulting from a 10 percent tax on adult-use marijuana sales under the bill would go to the state's general revenue fund with the other half being divided between law enforcement and mental health and addiction treatment and recovery services. Medical cannabis would remain untaxed...

LEGALITY OF CANNABIS IN THE UNITED STATES



Adult Use



Medical Only



Decriminalized

INTERNATIONAL REGULATIONS



Nepal

The campaigners have convinced some politicians of the benefits of legalizing marijuana. Health minister Birod Khatiwada, a powerful member of the governing coalition, has been lobbying for the proposed bill and has registered for debate in Parliament on the issue. He said about 9,000 people are currently in jail on marijuana-related charges.



Canada

Canopy Growth has struck a deal to buy leading U.S. edibles maker Wana Brands for \$297.5 million in the latest wager by a large Canadian producer that the United States will eventually legalize marijuana. Canadian edibles sales amounted to 91.7 million Canadian dollars (\$74.2 million) in the first half of 2021, according to new data released by Statistics Canada.



Costa Rica

Costa Rica's Congress on Tuesday approved the legalization of marijuana for medicinal purposes, despite opposition from conservative groups and President Carlos Alvarado who still needs to put his stamp of approval on the law. The law allows for the production and processing of cannabis, but does not regulate its recreational use.

Investor's Eye Major Cannabis Reform in Europe's Biggest Market.

Germany held national elections at the end of September with big implications for cannabis in the European Union (EU). What happened and what does it mean for cannabis liberalization in Europe?

The Social Democratic Party (SPD) won the most seats displacing retiring Chancellor Angela Merkel's Christian Democratic Union (CDU/CSU) as the biggest party in the German Bundestag (Parliament).

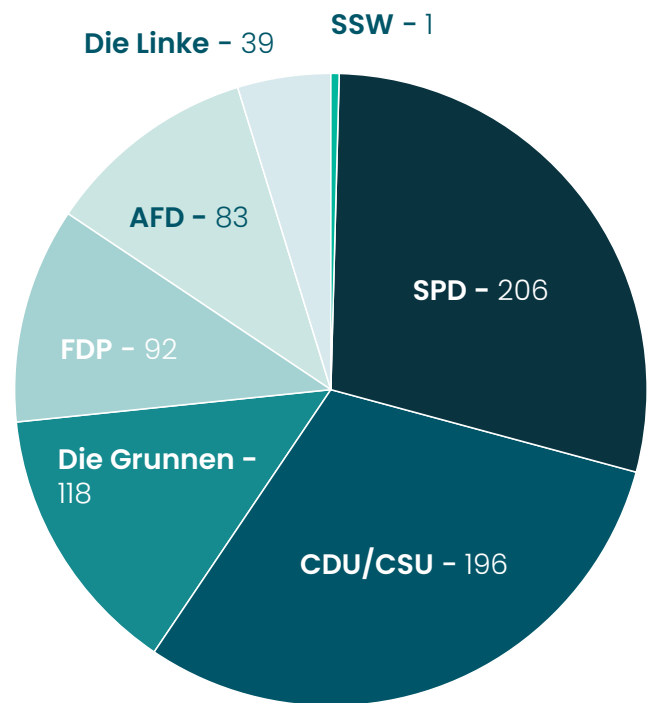
Under the German parliamentary system, if no political party wins a majority of seats in the Bundestag, they must work with other parties to form a coalition government that holds a majority of the seats. The parties negotiate with each other over who gets to run government ministries and the overall policy direction and goals their coalition would prioritize.

These coalitions can take weeks and months to form. Because the SPD received the most votes and allocated the most seats in the Bundestag, they have first chance to form a majority coalition.

The negotiations are currently underway. Most observers believe a 'Stop Light'* coalition of the Social Democrat Party (SDP), the liberal Free Democratic Party (FDP), and the Green Party is the most likely to form a coalition government for Germany for the next five years.* The FDP and Greens received the 3rd and 4th highest number of seats in parliament, and such a coalition would give the new government a comfortable majority.

The FDP and Greens have explicitly come out in favor of legalization of cannabis, and the SDP has advocated in favor of allowing adult-use cannabis trials in German cities. Cannabis liberalization is one of the major issues both the FDP and Greens agree on, and when recently asked which policy would be easiest to implement with the Greens, Christian Lindner, the leader of the FDP, said "legalisation of cannabis."

* 'Stop Light Coalition' arises from the fact that the parties' traditional colors, respectively red, yellow, and green, resemble the normal color sequence of a traffic light.



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“Germany will introduce cannabis reform, that’s for sure,” says lawyer, writer and German cannabis policy expert Kai-Friedrich Niermann. “The traffic light coalition talks about modernizing Germany, which certainly includes a new drug policy. In 2-3 weeks, we will know exactly what the new government has committed itself to.”

Niermann believes reform will happen in steps but is optimistic it will move forward quickly. “Full legalization is not expected overnight; first decriminalization will be decided. In the best case, decriminalization will be decided in the first 100 days. Then the debates and hearings on the Green Party’s cannabis control law will begin. Many individual points are still unclear — advertising, quality, and product safety regulations still need to be detailed. We estimate that this phase will take the entire year 2022 and the first half of 2023. The final draft legislation will then be adopted in the 2nd quarter of 2023 at the latest. The first cannabis store can open on New Year’s morning 2024.”

// ***The first cannabis store can open on New Year’s morning 2024.***

Germany has the largest population and economy in the 27-country European Union. It also has an outsized influence on the domestic policy of EU member countries. If Germany creates an adult recreational cannabis market, the pressure to reform cannabis laws in the European Union and the domestic parliaments of the 27 member states would grow immensely.

Steps toward reform throughout the European continent and the UK have been slow and steady over the past five years. The creation of a legal, regulated multi-billion dollar cannabis market would likely bring a tidal wave of reform across Europe.

“If Germany legalizes,” says Niermann, “Europe will follow in the short to medium term. This will create huge investment and growth opportunities. I advise all American companies and investors to look at the situation immediately and carefully.”

About the Author



Marc Brandl

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Marc Brandl is a research analyst for The Arcview Group. He has over 20 years of experience in the field of cannabis – first as a campaign manager and policy activist in Washington, DC for Marijuana Policy Project (MPP) and other advocacy groups, and in the past seven years working directly in the cannabis industry.

He can be reached at marcbrandl@arcviewgroup.com

The NBA Will Not Randomly Test Players for Marijuana This Season:

What Does This Mean for the Stigmatization of Marijuana in Professional Sports and Beyond?



The debate surrounding recreational marijuana use is perhaps loudest at the level of professional sports. Historically, the control over athlete's bodies and recreational time has created a storm of discontent, but the tide appears to be turning for athletes who desire to use cannabis while playing their sport at the highest level.

Since the National Basketball Association (NBA) suspended marijuana testing in March 2020, after play ended in the early days of the coronavirus pandemic, it was unclear whether testing would resume as the nation recovered. On October 6th, the NBA announced their agreement with the National Basketball Player Association (NBPA) "to extend the suspension of random testing for marijuana for the 2021-

22 season and focus our random testing program on performance-enhancing products and drugs of abuse." Although the league initially decided to suspend marijuana testing to reduce COVID-19 transmission, this renewed testing suspension suggests the stigma may be lifting from marijuana usage in professional athletics.

Such paramount decisions have also been made by the National Hockey League and National Football League, both of which amended their cannabis policies so players that test positive for cannabis are no longer suspended. Additionally, Major League Baseball has entirely suspended cannabis testing among players, and the Ultimate Fighting Championship announced it will no longer penalize fighters for consuming

The NBA Will Not Randomly Test Players for Marijuana This Season:

What Does This Mean for the Stigmatization of Marijuana in Professional Sports and Beyond?

cannabis. As professional sports leagues gradually work to destigmatize marijuana, many cannabis advocates trace this progress to one pivotal month: July 2020, when American sprinter Sha'Carri Richardson was disqualified from competing for the U.S. Olympic team in the 4×100 relay team in Tokyo and 100-meter individual race following a positive marijuana test. Such crushing instances of cannabis stigmatization, coupled with the outpouring of support from Richardson's fans and the cannabis community, illuminate the gravity of the most recent NBA decision to suspend marijuana testing. Professional basketball players – and, perhaps soon, all professional athletes – will be empowered to incorporate cannabis in a capacity that best supports their physical and mental health.

Marijuana usage may not only be viewed as a basic civil liberty among athletes, but also as an aid for athletic recovery. Rosie Mattio, CEO of Mattio Communications and guest on "The Dime" Podcast uses the substance recreationally and while training for competitive bodybuilding. Early in her bodybuilding and marketing career, Mattio read numerous anecdotal

reports and emerging medical research suggesting cannabis can boost workout performance, aid sleep and treat sore muscles. Based on her research, Mattio made the decision to exchange alcohol for cannabis and attributes marijuana to her first competitive bodybuilding victory. Mattio is now a prominent name in both cannabis marketing and the fitness community, and believes passionately in the "power of the plant" as well as the social imperative of cannabis offense expungement initiatives.

Influential figures like Mattio and Sha'Carri Richardson, coupled with testing decisions made by the NBA and other professional leagues, collectively represent a key turning point for cannabis advocates and consumers at large. Beyond the experiences of individual athletes, marijuana is repeatedly cited as a health and wellness aid for recreational fitness goers, as well as medical patients, and individuals struggling with chronic pain, anxiety and other health issues. As states and sports leagues gradually normalize cannabis usage, athletes and advocates will continue to rally against "Prohibition 2.0" and assert their rights as individuals, players, professionals, and patients.

The NBA Will Not Randomly Test Players for Marijuana This Season:

What Does This Mean for the Stigmatization of Marijuana in Professional Sports and Beyond?

Take-Aways:

- The NBA recently announced it would continue the suspension of marijuana testing among its athletes, instead focusing its attention on “performance-enhancing drugs and drugs of abuse.”
- This decision mirrors other recent decisions made by other professional sports leagues to gradually destigmatize marijuana use among professional athletes.
- Backing up these decisions, cannabis advocates and industry professionals, such as Mattio Communications CEO Rosie Mattio, continue to speak out in strong support of cannabis in athletic recovery and overall wellness.
- Decisions made by professional sports leagues have a significant impact on the image of marijuana in the athletic sphere as well as in everyday life.



A Note to the Eager Entrants Post Cannabis Conferences

Here comes the next wave of wide-eyed individuals looking to enter the cannabis space. I recently returned from two conferences, MJBIZCON and NECANN. Both conferences provided opportunities to reconnect with individuals in the space and see growth over the last 18 months. A common theme I saw at both conferences was the eager, wide-eyed individuals looking to migrate their experiences and backgrounds into the cannabis space. The cannabis industry is like alcohol or tobacco thus allowing for a seamless transition they asked? Sorry guys, not quite. While true in theory, cannabis always operates differently. While it's impossible to share how and why cannabis operates different there is a major recommendation that can be helpful when learning about the differences. With early decisions crucial to the success of opportunities, this piece of advice may help other new entrants in the market.

Partners make all the difference. Trusted experienced resources can help you foresee obstacles and navigate the tricky and expensive waters that is cannabis. As a service provider in the space for ~3 years, which by no means is a great length, I've been fortunate to be a part of multiple

conversations. These experiences have allowed me to see catastrophic mistakes by taking short cuts early in the growth of their business. Partners or resources where you can lean on experienced individuals make all the difference in the world. We highly recommend when building out your business, use a mentor or advisor with industry experience as a sounding board for the numerous challenges.

The second recommendation is to be willing to learn and be a sponge. It's challenging to pick apart the complexities of the various industry sectors. The challenges are endless, some minor but others massive and difficult to navigate. Leaning on experienced resources and recognizing the value they bring to the table can make all the difference, while navigating these new, untapped opportunities. The year of the east coast is almost here and with it we will continue to welcome new individuals into the space. We wish you all the best and encourage you to push the limits of what you can accomplish and lean on those who have the scars of experience.

There's tremendous opportunity for all, and as the saying goes, "rising tide lifts all ships."

RAW MATERIALS



TESTING



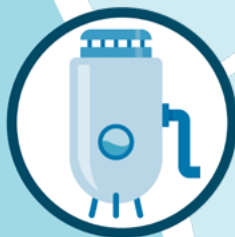
NOVEMBER 2021

What's this month's broken link in the supply chain?

Logistics and Distribution

The port of Los Angeles and Long Beach have come to agreements with workers to operate 24/7 to alleviate the bottle neck in the supply chain as more cargo ships continue to build up off the coast of California. Unloading cargo ships only solves one piece of the puzzle, the good news continues as the Union Pacific extends their operating hours to assist both ports and help distribute the goods into the heart of our country. These announcements come after the Biden administration called on private stakeholders to follow the port of Los Angeles' lead and move to 24/7 operations to keep up with demand.

MANUFACTURING



THE
BREAKING
POINT

DISTRIBUTION



RETAIL



CUSTOMER



BRAND SPOTLIGHT



WHY WE LOVE THEM:

As cannabis moves its way toward a full-fledged CPG industry, standing out from your peers is critical for success. Fonts are a clean, slick way for building brand recognition and catching the eye of your targeted consumer.



STIIIZY

OUR RATING: 9.2/10



Fonts play a valuable role in accentuating brands. Fonts can sometimes be the forgotten part of branding profile. They are a key component in your visual buildout of your packaging. As users scan products on the shelf, how do you attract them? Stiiizy crushes these details and shines with the other elements of their branding.

Their website includes hashtag #staystiiizy which embodies the lifestyle that is this brand. Brands can be more than just products and Stiiizy does this well. The results are evident with millennials leading the charge with their vapes. The copy on their website solidifies this even further. As an example: "STIIIZY's proprietary pod system has garnered a cult-like following since its launch and has emerged as a leading lifestyle brand in cannabis."

Visit Stiiizy at <https://www.stiiizy.com/>

HOT IN THE NEWS

November 2021

‘Big cannabis can be good cannabis’

Curaleaf CEO, Joe Bayern

New York Welcomed Industry Leaders to the Stage to Discuss the State of the Market

MJBiz CEO sees at least 4 more states legalizing marijuana in 2022

Greenlane to Acquire Portable Vaporizer Manufacturer DaVinci for Up to \$20 Million

It's Official: Cannabis Vaping Products Cannot Be Shipped Via U.S. Postal Service, Including Hemp-Derived CBD

Dutchie Becomes the Most Valuable Cannabis Technology Company After \$350 Million Capital Raise

“Demand for pot edibles such as gummies has risen during the pandemic, as people stuck at home turn to cannabis-related products for relaxation and entertainment.”

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